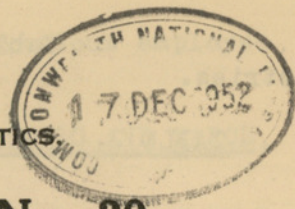


COMMONWEALTH BUREAU OF CENSUS AND STATISTICS



QUARTERLY BUSINESS SURVEY No. 20. PRELIMINARY RESULTS.

I. LABOUR TURNOVER

The first part of Quarterly Business Survey No. 20 dealt with labour turnover of employees in private non-rural employment in Australia during March, 1952. Employees were classified into male and female, manual and other workers. Similar surveys were conducted in March, 1949, and March, 1950, and the results of the present survey are compared with the results of the earlier surveys.

Labour turnover is frequently measured as engagements or separations (whichever is the lower) expressed as a percentage of average employment during the period under review. Table 1 below shows figures of both engagements and separations expressed as a percentage of average employment. Separations includes dismissals and retrenchments as well as those who left of their own accord, and a dissection of the total into these various groups is shown later in this report.

The period covered in individual returns was not uniform as it depended on the dates on which the February and March payroll tax returns were made up. The figures should be interpreted as applying to an average period of about 4½ weeks. In comparing turnover in different industries the possible effect of seasonal fluctuations should be kept in mind, but these should not affect comparisons with figures for earlier years.

TABLE 1. LABOUR TURNOVER, MARCH, 1950 AND MARCH, 1952
(percentage of average number of employees in each group)

	Males				Females			
	Engagements		Separations		Engagements		Separations	
	1950	1952	1950	1952	1950	1952	1950	1952
	%	%	%	%	%	%	%	%
Manufacturing -								
Manual workers	8.4	6.0	8.7	7.0	10.5	6.4	8.6	9.7
Other workers	2.2	1.9	1.6	1.9	4.8	4.0	4.3	4.2
Other Industries -								
Manual workers	7.3	6.5	7.6	6.8	12.0	8.1	11.0	9.9
Other workers	2.8	2.6	2.4	2.5	6.3	5.5	6.2	5.8
All Industries -								
Manual workers	8.0	6.2	8.3	7.0	11.0	6.8	9.3	9.7
Other workers	2.6	2.3	2.1	2.3	5.9	5.1	5.7	5.4

Earlier surveys showed that there was very little change in labour turnover between March, 1949 and March, 1950. Table 1 shows that quite marked changes took place between March, 1950 and March, 1952. Between March, 1950 and March, 1952, the separation rates fell in most cases, though this did not apply to male non-manual workers not to female manual workers in manufacturing. The rise from 8.6 per cent to 9.7 per cent in the last mentioned group was mainly accounted for by the rise which occurred in the textile and clothing industries in which at the time employment was declining fairly rapidly and there were therefore a considerable number of retrenchments. Engagement rates were down in all groups reflecting in part the lower level required to replace employees who left and in part the fact that in some directions employment was being reduced. In all industries the turnover rates among non-manual workers are much less than among manual workers and the changes did not appear to be important.

Table 2 shows separation rates for manual workers in individual industries.

TABLE 2. PERCENTAGE SEPARATIONS FOR MANUAL WORKERS BY INDUSTRY,

1949-1952

(percentage of average number of employees : month of March)

	Males			Females		
	1949	1950	1952	1949	1950	1952
	%	%	%	%	%	%
Manufacturing -						
Engineering metal working and vehicle building	8.1	7.4	6.2	11.6	12.1	10.8
Textiles	9.1	9.2	9.1	9.1	7.1	9.0
Clothing	5.0	6.3	8.5	5.0	5.8	9.5
Food, drink, tobacco	10.2	13.0	8.8	21.7	13.7	9.2
Furniture, sawmilling and woodworking	11.6	9.9	7.0	(c)	(c)	(c)
Paper, printing	4.5	4.8	3.8	6.6	9.3	10.4
Other manufacturing	8.3	8.5	7.7	7.5	13.2	10.5
All manufacturing	8.5	8.7	7.0	8.9	8.6	9.7
Mining	3.4	4.1	2.7	(b)	(b)	(b)
Building	10.7	8.4	10.9	(b)	(b)	(b)
Road transport	6.7	7.4	4.1	(b)	(b)	(b)
Wholesale trade	5.6	8.1	5.4	4.9	6.7	5.4
Retail trade	5.1	5.6	4.8	5.5	6.3	7.9
All Other (a)	9.6	10.4	9.7	11.1	13.4	11.4
All Industry (a)	8.0	8.3	7.0	9.0	9.3	9.7

(a) Excludes shipping and stevedoring. (b) Included with "all other".

(c) Included with "other manufacturing".

For male manual workers in manufacturing industry the highest separation rate was 9.1% in the textile industry. Turnover in food, drink and tobacco manufacturing which was the highest in 1950, fell from 13.0% in 1950 to 8.8% in 1952. Paper and printing still has the lowest turnover in manufacturing, and the engineering industry remained below the average. Turnover in the clothing industry which was low in 1949 and 1950 rose to 8.5% in 1952. In the non-manufacturing industries building had the highest separation rate at 10.9%, and mining the lowest at 2.7%.

In most industries the turnover for females is much higher than the corresponding male rate, but otherwise the female rates follow the same general pattern as the male rates. Between 1950 and 1952 there was a marked rise in the separation rate for females employed in the clothing industry, and a considerable drop in the rate in food, drink and tobacco manufacturing.

Separation Rates by class of Separation

In these Surveys separations have been broken down into types of separations (dismissed, retrenched, left and others). Correspondents have been asked to class employees as "dismissed" where employment was terminated on the employer's initiative for disciplinary or similar reasons; as "retrenched" where employment was terminated, permanently or otherwise, on the employer's initiative for reasons such as reduction in the scale of operations, breakdown in machinery, shortage of materials, etc.; as "left" where employment was terminated on the employee's initiative; and as "other" where the separation was due to death, injury, permanent retirement (including women leaving to be married), enlistment in the forces and similar reasons.

Table 3 analyses the separation rate for various employee groups into the rates for different types of separations.

TABLE 3. SEPARATION RATES BY CLASS OF SEPARATION, MARCH, 1950 AND MARCH, 1952
(percentage of average employment)

	March, 1950					March, 1952				
	D.	R.	L.	O.	Tot.	D.	R.	L.	O.	Tot.
	%	%	%	%	%	%	%	%	%	%
Manufacturing -										
Males:										
Manual workers	0.8	0.5	7.3	0.1	8.7	1.1	1.6	4.2	0.1	7.0
Other workers	0.2	-	1.4	-	1.6	0.2	0.3	1.3	0.1	1.9
Females:										
Manual workers	0.6	0.6	7.2	0.2	8.6	1.1	4.1	4.2	0.3	9.7
Other workers	0.2	-	4.1	0.1	4.4	0.1	0.8	3.1	0.1	4.1
Other Industries -										
Males:										
Manual workers	1.0	0.7	5.6	0.3	7.6	1.1	1.2	4.4	0.1	6.8
Other workers	0.2	0.1	1.9	0.1	2.3	0.6	0.3	1.4	0.2	2.5
Females:										
Manual workers	2.0	0.3	8.3	0.4	11.0	1.8	0.9	6.9	0.3	9.9
Other workers	0.2	0.2	5.6	0.2	6.2	1.2	0.5	3.9	0.2	5.8

(D. Dismissed; R. Retrenched; L. Left; O. Other Separations)

In all groups there was a fall in the percentage of employees who left jobs on their own initiative and a rise in the percentage who were retrenched. The changes were greatest among manual workers in manufacturing industries.

Table 4 shows for male and female manual workers an analysis of separations in March, 1950 and March, 1952 in the main industry groups. Since this table shows the types of separation as a percentage of total separations in each group, it needs to be read in conjunction with table 2.

TABLE 4. ANALYSIS OF SEPARATIONS FOR MANUAL WORKERS, MARCH, 1950 AND MARCH, 1952
(percentage of total separations in each industry and employee group)

	March, 1950				March, 1952			
	D.	R.	L.	O.	D.	R.	L.	O.
	%	%	%	%	%	%	%	%
MALES								
Manufacturing -								
Engineering, vehicles, etc.	8	2	89	1	13	21	65	1
Textile ..	6	1	92	1	16	47	36	1
Clothing ..	17	1	80	2	36	18	45	1
Food, drink, tobacco	10	17	72	1	12	37	50	1
Furniture, woodworking	4	1	95	-	12	17	71	-
Paper, printing	8	1	91	-	15	6	78	1
Other manufacturing	8	5	86	1	21	16	62	1
All Manufacturing	9	6	84	1	16	23	60	1
Mining ..	1	-	96	3	3	6	85	6
Building ..	18	4	78	-	18	15	67	-
Road Transport ..	14	2	84	-	16	20	64	-
Wholesale and Retail Trade	5	22	67	6	14	24	60	2
Other Industries ..	26	1	65	8	21	19	56	4
All Industries ..	10	7	81	2	16	21	61	2

TABLE 4. ANALYSIS OF SEPARATIONS FOR MANUAL WORKERS, MARCH, 1950
AND MARCH, 1952 (CONTINUED)

(percentage of total separations in each industry and employee group)

		March, 1950				March, 1952			
		D.	R.	L.	O.	D.	R.	L.	O.
<u>FEMALES</u>									
Manufacturing -		%	%	%	%	%	%	%	%
Engineering, vehicles, etc.	..	5	8	87	-	3	56	40	1
Textile	..	7	-	92	1	11	52	36	1
Clothing	..	6	-	90	4	16	47	33	4
Food, drink, tobacco	..	9	22	69	-	12	27	55	6
Paper, printing	..	19	3	76	2	-	18	76	6
Other manufacturing	..	3	2	92	3	3	38	58	1
All Manufacturing	..	7	7	84	2	11	43	43	3
Wholesale and Retail Trade	..	12	11	73	4	10	34	55	1
Other Industries	..	21	1	78	-	21	2	73	4
All Industries	..	11	6	81	2	13	34	50	3

(D. Dismissed; R. Retrenched; L. Left; O. Other reasons)

In 1950 employees leaving on their own initiative accounted for 81% of all separations for manual workers, and no industry had less than 65% of its separations in that category. By March, 1952 the percentage of separations caused by employees leaving of their own accord fell from 81% to 61% for males, and from 81% to 50% for females. Retrenchments had increased as a percentage of total separations from 7% to 21% for males and from 6% to 34% for females. The changes were most marked in the textile industry and amongst females in the engineering and clothing industries.

An analysis of the separations of non-manual workers is not shown but the changes were similar. Retrenchments had become a much larger percentage and those leaving a much smaller percentage of the total, although the leavers still account for more than 50% of the total.

II. VALUE OF STOCKS OF GOODS

The second part of Quarterly Business Survey No. 20 asked for estimates of the value of stocks held at September, 1951 and March, 1952.

Table 1 shows the estimated total book value of stocks of goods held by those private manufacturing and trading businesses which are subject to payroll tax. Businesses which are not subject to tax, including family business not employing labour, are excluded.

TABLE 1. BOOK VALUE OF STOCKS OF GOODS HELD BY MANUFACTURERS AND TRADERS,
1946 TO MARCH, 1952

		As at balancing dates in the year ended September					Sept. 1951	March 1952
		1946	1947	1948	1949	1950		
		£m.	£m.	£m.	£m.	£m.	£m.	£m.
Manufacturers	..	217	260	322	384	443	595	774
Traders	..	114	163	212	242	285	358	469
TOTAL:		331	423	534	626	728	953	1,243

The 1951 figures refer to stocks held at balancing dates occurring between about October, 1950 and September, 1951, and similarly for earlier years. Between the 1951 balancing dates and September, 1951 the value of manufacturers' stocks rose by 6%, wholesale and retail traders' stocks by 13% and the total by 9%. Between September, 1951 and March, 1952 the value of manufacturers' stocks rose rather more rapidly than traders' stocks, due to a considerable slackening in the increase in retailers' stocks and the figures for both groups at March, 1952 were about 30% up on the 1951 level.

Table 2 shows the values of stocks held in the principal manufacturing industries since 1946.

TABLE 2. BOOK VALUE OF STOCKS OF GOODS HELD BY MANUFACTURERS
1946 TO MARCH, 1952

	As at balancing dates in the year ended September						Sept	March
	1946	1947	1948	1949	1950	1951	1951	1952
	£m.	£m.	£m.	£m.	£m.	£m.	£m.	£m.
Engineering, vehicles ..	81	95	115	140	175	234	248	301
Textiles ..	16	18	21	30	36	60	58	62
Clothing ..	18	21	29	36	39	51	54	59
Food, drink, tobacco ..	44	53	60	66	73	94	104	126
Paper, printing ..	11	15	23	25	22	28	30	43
Other manufacturing ..	47	58	74	87	98	128	137	183
All manufacturing:	217	260	322	384	443	595	631	774

The total value of stocks held by manufacturers increased by £143m. between September, 1951 and March, 1952. The increases were substantial in all industries except the textile and clothing industries in which the increases were less than 10%. In the woollen section of the textile industry the value of stocks fell between 1951 balancing dates and September, 1951 and continued to fall between September, 1951 and March, 1952. Between September and March, however, the rise in the cotton section more than offset the fall in the woollen section of the industry.

Table 3 shows the values of stocks held by wholesale and retail traders since 1946.

TABLE 3. BOOK VALUE OF STOCKS OF GOODS HELD BY TRADERS, 1946 TO MARCH, 1952

	As at balancing dates in the year ended September						Sept.	March
	1946	1947	1948	1949	1950	1951	1951	1952
	£m.	£m.	£m.	£m.	£m.	£m.	£m.	£m.
Wholesale trading	59	88	121	140	170	205	222	278
Retail trading	55	75	91	102	115	153	181	191
All Trading:	114	163	212	242	285	358	403	469

Stocks held by retail traders showed a relatively more rapid increase than wholesalers' stocks during the year or two prior to September, 1951 but more recently the rise in retail stocks slackened. Between September, 1951 and March, 1952 their value increased by 5% as compared with an increase of over 20% in the value of wholesalers' stocks.